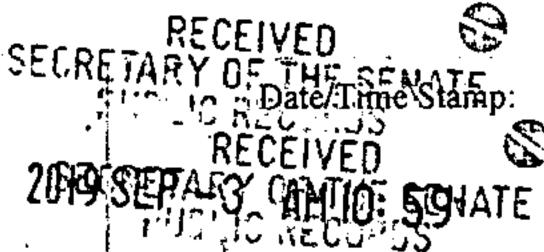
# **Employee Post-Travel Disclosure of Travel Expenses**



Post-Travel Filing Instructions: Complete this form within 30 days of returning from 2019 SEP -3 AM 10: 58 travel. Submit all forms to the Office of Public Records in 232 Hart Building.

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•	ule 35.2(a) and (c), I m r me. I also certify tha	<del>-</del>	sures with respect to	o travel expenses that have been or w
☐ A <u>copy</u> of the <i>Prive</i>	ate Sponsor Travel Ce	rization (Form RE-1), <u>A</u> rtification Form with all	attachments (itinera	
Private Sponsor(s) (lis		stitute, Inc. Educatio	n and Society P	rogram
Travel date(s):		<u> </u>		
Name of accompanyin Relationship to Travel	<u> </u>	ny): Child		
	COSTS IN EMPLOYEE	EASE DUE TO THE ACC EXPENSES. (Attach addit		USE OR DEPENDENT CHILD, ONLY iry.)
expenses for Employ	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
☑ Good Faith Estimate □ Actual Amount		\$188.00 for two nights total	\$110.50	\$402.50 meeting room fees (including meeting facilities, set up/take down, cleaning, meeting materials)
Expenses for Accomp	panying Spouse or De	ependent Child (if applic	able):	
	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
☐ Good Faith Estimate	N/A	N/A	N/A	N/A
☐ Actual Amount				
Provide a description necessary.): See att	of all meetings and evached agenda for	vents attended. See Senat descriptions.	e Rule 35.2(c)(6). (	Attach additional pages if
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3/3/19	Messeen	Stern		
3/ (Date)	(Printed r	name of traveler)		/(Signature of traveler)
···	D BY SUPERVISING	MEMBER/OFFICER:		
have made a determin	nation that the expense	es set out above in conne		escribed in the Employee Pre-Travel
<i>luinorization</i> form, ar	e necessary transporta	tion, lodging, and related	i expenses as detine	a in Kule 33.
		•	<b></b>	

(Revised 1/3/11)



(Revised 10/19/15)

# EMPLOYEE PRE-TRAVEL AUTHORIZATION

<u>Pre-Travel Filing Instructions</u>: Complete and submit this form at least 30 days prior to the travel departure date to the Select Committee on Ethics in SH-220. Incomplete and late travel submissions will <u>not</u> be considered or approved. This form <u>must</u> be typed and is available as a fillable PDF on the Committee's website at ethics.senate.gov. Retain a copy of your entire pre-travel submission for your required post-travel disclosure.

ETHIC JUL 8'19pm12:83

Form RE-1

	Matthew Stern
Name of Traveler:	
Sena	ate HELP Committee - Chairman Alexander
Employing Office/Committee:	
The Aspen Institute, Inc. (Education	n and Society Program)
Private Sponsor(s) (list all):	
August 6-8, 2019	
Travel date(s):	
Note: If you plan to extend the trip for any reason y	ou must notify the Committee.
Warrenton, VA	
Destination(s):	
Explain how this trip is specifically connected to the travele	er's official or representational duties:
· · · · · · · · · · · · · · · · · · ·	. This trip is convening senior education staffers on implementation of ound school improvement strategies and innovation will help me to istricts, and schools.
Name of accompanying family member (if any):	complete and correct to the best of my knowledge:
(Date)	(Signature of Employee)
Secretary for the Majority, Secretary for the Minority, and Chapla Senator Alexander  I, hereby a	Matthew Stern authorize
(Print Senator's/Officer's Name)	(Print Traveler's Name)
related expenses for travel to the event described above. I h	nt or reimbursement for necessary transportation, lodging, and have determined that this travel is in connection with his or her create the appearance that he or she is using public office for
of the Senate. (signify "yes" by checking box)	s spouse or child is appropriate to assist in the representation
7/8/19 (Date)	(Signature of Supervising Senator/Officer)



June 18, 2019

Dear Senate Colleague,

We are writing to invite you to participate in an upcoming retreat – "Implementing ESSA: School Improvement and Innovation" – for the Aspen Senior Congressional Education Staff Network from 12:00 PM Tuesday, August 6, 2019 to 1:00 PM Thursday, August 8, 2019 at Airlie House, 6809 Airlie Road, Warrenton, VA 20187, located 50 miles from Washington, DC.

At this convening, staffers will hear from state and district leaders on the implementation of the Every Student Succeeds Act. Staffers will understand how states implementing their ESSA plans and building coherence across priorities, systems, and programs. Participants will also have a chance to explore school improvement, including how states and districts are responding to new reporting requirements and taking advantage of flexibilities to implement innovative initiatives like project-based learning and competency-based education. Finally, the retreat will provide an opportunity for staffers to engage in their own learning and build working relationships with colleagues from different parties and chambers and with leading experts in the field.

We are committed to working with you and the Senate Ethics Committee to ensure compliance with the Senate rules regarding privately-funded sponsored travel. Enclosed you will find all the forms necessary for filing the trip with the Ethics Committee:

A detailed agenda listing discussion sessions

A completed Private Sponsor Travel Certification Form and appendix

A list of invited Senate staffers

A blank Employee Pre-Travel Authorization form

You must complete the Traveler Form and submit it with the enclosed agenda, list of invited staffers, and Primary Trip Sponsor Form directly to the Senate Ethics Committee (220 Hart) no later than Monday, July 8, 2019. After receiving the completed travel package, the Ethics Committee will review and issue an approval to you or your sponsoring Member. After the trip, you will need to complete a post-travel form that we will email to you after the site visit.

Attendance is by invitation only, with no outside observers or lobbyists. Funding is provided solely by grants from established foundations – no government, individual, foreign, corporate, or special interest money is accepted. The Network is supported by The Bill & Melinda Gates Foundation. The Aspen Education & Society Program maintains autonomy over invitations, materials, and the agenda for the retreat.

The retreat will begin at 12:00 PM on Tuesday, August 6, 2019, at Airlie House and will conclude at 1:00 PM on Thursday, August 8, 2019. Please plan your travel accordingly in order to be present for the duration of the retreat. Dress is business casual for all meetings.

The retreat promises to be productive and informative. We look forward to seeing you there.

Warm regards,

Ross Wiener

Danielle Gonzales

Marisa Goldstein

Doug Mesecar

# PRIVATE SPONSOR TRAVEL CERTIFICATION FORM

This form must be completed by any private entity offering to provide travel or reimbursement for travel to Senate Members, officers, or employees (Senate Rule 35, clause 2). Each sponsor of a fact-finding trip must sign the completed form. The trip sponsor(s) must provide a copy of the completed form to each invited Senate traveler, who will then forward it to the Ethics Committee with any other required materials. The trip sponsor(s) should NOT submit the form directly to the Ethics Committee. Please consult the accompanying instructions for more detailed definitions and other key information.

The Senate Member, officer, or employee MUST also provide a copy of this form, along with the appropriate travel authorization and reimbursement form, to the Office of Public Records (OPR), Room 232 of the Hart Building, within thirty (30) days after the travel is completed.

1.	Sponsor(s) of the trip (please list all sponsors):
	The Aspen Institute, Inc. (Education and Society Program)
2.	Description of the trip: Aspen Institute Education and Society program sponsored convening for senior
	education staffers on the Implementation of the Every Student Succeeds Act (ESSA) and next steps.
3.	Dates of travel: August 6-8, 2019
4.	Place of travel: Warrenton, VA
5.	Name and title of Senate invitees: Please see attached roster
6.	I certify that the trip fits one of the following categories:
	(A) The sponsor(s) are not registered lobbyists or agents of a foreign principal <u>and</u> do not retain or employ registered lobbyists or agents of a foreign principal <u>and</u> no lobbyist or agents of a foreign principal will accompany the Member, officer, or employee at any point throughout the trip.
	(B) The sponsor or sponsors are not registered lobbyists or agents of a foreign principal, but retain or employ one or more registered lobbyists or agents of a foreign principal and the trip meets the requirements of Senate Rule 35.2(a)(2)(A)(i) or (ii) (see question 9).
7.	I certify that the trip will not be financed in any part by a registered lobbyist or agent of a foreign principal.  -AND-
	I certify that the sponsor or sponsors will not accept funds or in-kind contributions earmarked directly or indirectly for the purpose of financing this specific trip from a registered lobbyist or agent of a foreign principal or from a private entity that retains or employs one or more registered lobbyists or agents of a foreign principal.
8.	I certify that:  The trip will not in any part be planned, organized, requested, or arranged by a registered lobbyist or agent of a foreign principal except for de minimis lobbyist involvement.
	= AND =
	The traveler will not be accompanied on the trip by a registered lobbyist or agent of a foreign principal except as provided for by Committee regulations relating to lobbyist accompaniment (see question 9).

9.	USE ONLY IF YOU CHECKED QUESTION 6(B)  I certify that if the sponsor or sponsors retain or employ one or more registered lobbyists or agents of a foreign principal, one of the following scenarios applies:
	(A) The trip is for attendance or participation in a one-day event (exclusive of travel time and one overnight stay) and no registered lobbyists or agents of a foreign principal will accompany the Members officer, or employee on any segment of the trip.
	(B) The trip is for attendance or participation in a one-day event (exclusive of travel time and two overnight stays) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee on any segment of the trip (see questions 6 and 10).
	(C) The trip is being sponsored only by an organization or organizations designated under § 501(c)(3) of the Internal Revenue Code of 1986 and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee at any point throughout the trip.
10.	USE ONLY IF YOU CHECKED QUESTION 9(B)  If the trip includes two overnight stays, please explain why the second night is practically required for Senate invitees to participate in the travel:
	· · · · · · · · · · · · · · · · · · ·
	<u></u>
11,.	An itinerary for the trip is attached to this form. I certify that the attached itinerary is a detailed (hourby-hour), complete, and final itinerary for the trip.
12.	Briefly describe the role of each sponsor in organizing and conducting the trip:
	The Aspen Institute is the sole sponsor of this retreat and is solely responsible for the development and
	execution of the convening. (see continued response)
13.	Briefly describe the stated mission of each sponsor and how the purpose of the trip relates to that mission:
	The Aspen Institute is an educational and policy studies non-profit organization whose mission is to foster
	leadership based on enduring values and provide a non-partisan forum for the exchange of ideas.
	(see continued response)
14.	Briefly describe each sponsor's prior history of sponsoring congressional trips:
	The Aspen Institute has a nearly forty year history of conducting non-partisan educational forums, which
	often include Members of Congress and staff. The Aspen Institute Education and Society program
	has been conducting convenings for Congressional education staff for over twelve years.

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Briefly describe the educational activities performed by each sponsor (other than sponsoring congrettrips):				
The Aspen Institute	holds numerous educat	ional activities, includin	g educational brie	fings, roundtables,
forums, and conferences for a diverse range of attendees including federal and state poli				policymakers,
business and organi	zational leaders, memb	ers of the press and the	e general (see co	ntinued response)
Total Expenses for E	ach Participant:			
	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses
Good Faith estimate  Actual Amounts	\$58.00 (round trip mileage and tolls)	\$188.00 for two nights total	\$110.50	\$402.50 meeting room fees (includes meeting facilities, set up/take down, cleaning, meeting materials)
participation or b) th congressional partici	rip involves an event the trip involves an event pation:  ed specifically with regard	that is arranged or orga	anized <i>specifically</i>	with regard to
their learning on imp	lementation of the Ever	y Student Succeeds Ac	;t.	
Reason for selecting	the location of the even	t or trip		-
The location is close	to Washington, DC for	easy staffer travel and	allows faculty mer	nbers (external
experts brought in to	support the retreat) to t	fly into DCA, Dulles or E	3Wi and travel eas	sily to the facility.
Name and location of	f hotel or other lodging	facility:		
Airlie House, 6809 A	irlie Road, Warrenton, \	/A 20187		
	· ·			
Reason(s) for selecting	ng hotel or other lodging	g facility:		
The meeting location	has sufficient meeting	space and lodging to s	upport off-the-reco	ord, non-partisan

21.	Describe how the daily expenses for lodging, meals, and other expenses provided to trip participants compares to the maximum per diem rates for official Federal Government travel:				
	Rooms are \$94.00 per day, which reflects the per diem limit				
	Meals are 8/6/19 \$14.25 per day, 8/7/19 \$55.00 per day, 8/8/19 \$41.25 per day, which reflects the				
	per diem limit				
22.	Describe the type and class of transportation being provided. Indicate whether coach, business-class or first class transportation will be provided. If first-class fare is being provided, please explain why first-class travel is necessary:				
	Transportation is not provided; mileage will be reimbursed for participants' travel by personal car				
23.	I represent that the travel expenses that will be paid for or reimbursed to Senate invitees do not include expenditures for recreational activities, alcohol, or entertainment (other than entertainment provided to all attendees as an integral part of the event, as permissible under Senate Rule 35).				
24.	List any entertainment that will be provided to, paid for, or reimbursed to Senate invitees and explain why the entertainment is an integral part of the event:  None				
25.	I hereby certify that the information contained herein is true, complete and correct. (For trips involving more than one sponsor, you must include a completed signature page for each additional sponsor):  Signature of Travel Sponsor:				
	Name and Title: Elliot Gerson, Executive Vice President, Policy & Public Programs				
	Name and Title: The Aspen Institute Name of Organization:				
	Address: 2300 N Street NW, Suite 700, Washington, DC 20037				
	Telephone Number: 202-736-5859 (Lisa Jones, Deputy General Counsel)				
	Fax Number: 202-467-0790				
	E-mail Address: lisa.jones@aspeninst.org				

Appendix to Private Sponsor Travel Certification Form

Aspen Institute Senior Congressional Education Staff Network Retreat, August 6-8, 2019.

Question 12. Briefly describe the role of each sponsor in organizing and conducting the trip (response continued) — The Bill & Melinda Gates Foundation is not a sponsor of this trip and did not play a role in organizing, planning or conducting the trip. The Foundation provided grant funding to support the Aspen Institute Education & Society Program, including the Aspen Senior Congressional Education Staff Network; however, the Foundation did not earmark any funding for this trip.

Questions 13. Briefly describe the stated mission of each sponsor and how the purpose of the trip relates to the mission (response continued) – The Aspen Institute Education and Society Program seeks to provide a neutral forum to aid education policymakers in their efforts to improve K-12 public education. The purpose of the trip is to conduct a non-partisan educational retreat that encourages off-the-record, candid exchanges of ideas to support staffers' learning.

Question 15. Briefly describe the educational activities performed by each sponsor (other than sponsoring congressional trips) (response continued) — The Aspen Institute organizes numerous educational activities, including educational briefings, roundtables, forums and conferences for a diverse range of attendees including federal and state policymakers, business and organizational leaders, members of the press and the general public. The Aspen Institute Education and Society Program works with federal, state and local education leaders to improve K-12 student achievement, particularly for underserved students.

C)

# Aspen Senior Congressional Education Staff Network Retreat

# Implementing ESSA: School Improvement and Innovation

Airlie House 6809 Airlie Road Warrenton, VA 20187 P: 540-347-1300

August 6-8, 2019

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# Aspen Senior Congressional Education Staff Network Retreat

Implementing ESSA: School Improvement and Innovation

Airlie House 6809 Airlie Rd Warrenton, VA 20187 P: (540) 347-1300

August 6-8, 2019

# **AGENDA**

### **Retreat Goals:**

Understand how states and districts are implementing the Every Student Succeeds Act (ESSA), including school improvement strategies after the first year of school identifications; Understand how states and districts are using innovation, especially around teaching and learning, accountability, and assessment, to address equity and support school improvement; Engage in active learning and build working relationships with education leaders from the field, as well as with colleagues from different parties and chambers.

# Tuesday, August 6, 2019

All meeting sessions are in the Federal Room

12:00 PM	Arrival and Check-In
12:30 – 1:00 PM	Lunch Airlie Room
1:15 – 1:45 PM	Welcome, Overview, and Retreat Objectives
	To guide the retreat's discussion, Congressional staffers and faculty members will begin by sharing their top learning objectives for the convening.
1:45 – 3:15 PM	Session I: Lessons from ESSA Accountability Year 1 Implementation
	Tiffany Stanley, Chief of Staff to the State Superintendent of Public Instruction, Utah State Board of Education
	Bryan Johnson, Superintendent, Hamilton County Schools
	Leah Walker, Director, Office of Equity and Community Engagement, Virginia Department of Education
	Guiding Questions:  How did the identification of schools for CSI, TSI or ATS compare to expectations and/or state plan projections?  What interventions are states and districts pursuing and what are the initial learnings from these approaches?  How are SEAs and LEAs preparing for year 2 of ESSA accountability implementation? What adjustments are being made?

To what extent and why are SEAs amending their approved ESSA plans and/or seeking waivers? How are states ensuring waivers improve equity in their ESSA plans?

What role has the U.S. Department of Education (ED) played during the first year of implementation, including ED's monitoring processes in states, and what are state and districts expectations for what they should be doing in year 2 and beyond?

3:15 - 3:30 PM

**Break** 

3:30 - 5:00 PM

# Session II: Innovation in Teaching & Learning, Accountability & Assessment

Virgel Hammonds, Chief Learning Officer, KnowledgeWorks

Leah Walker, Director, Office of Equity and Community Engagement, Virginia Department of Education

Cindy Ambrose, Deputy Superintendent, Charleston County School District

Tiffany Stanley, Chief of Staff to the State Superintendent of Public Instruction, Utah

State Board of Education

Faculty will present for the first half of the session, followed by a facilitated discussion.

Faculty will detail how states and districts are currently using innovative approaches to teaching and learning, accountability and assessment, to increase equity and outcomes for all students. They will describe how innovation intersects with ESSA and other federal and state laws and policies and where there are challenges or additional opportunities.

#### **Guiding Questions:**

What teaching and learning innovations, such as personalized learning or course access are states and districts pursuing as a result of ESSA (and/or federal policy)? Is Innovative Assessment Pilot enough to encouraging enough innovative assessment practices?

How do these innovations support ESSA's equity and outcome goals? How are these models being evaluated for impact? Or being used to support and complement school improvement initiatives?

5:00 **–** 5:15 PM

Taking stock: Staff reflections and feedback to guide remaining discussions

6:30 PM

**Networking Reception with Expert Faculty** 

Pavilion Room

Staffers will have the opportunity to network with faculty during the reception.

7:00 - 8:30 PM

Dinner with Discussion of Earlier Sessions

Pavilion Room

Wednesday, August 7, 2019

All meeting sessions are in the Federal Room

7:30 - 8:30 AM

**Breakfast** 

Airlie Room

8:30 - 8:35 PM

Group reflection on Day 1: What thoughts and questions were raised for further discussion?



#### 8:35 - 10:45 AM

### Session III: Deep Dive on School Improvement

Leighann Lenti, Chief of Partnership, University of Virginia Partnership for Leaders in Education

Gyimah Whitaker, Area Superintendent, Fulton County Schools

Staff will be led through a detailed presentation on district school improvement efforts being supported by the University of Virginia, with a close examination of the work in one partner district. Staff and faculty will consider implementation implications, including SEA and LEA capacity, equity, human capital decisions, budgeting, and overall strategy.

#### 10:45 - 11:15 AM

### Break and individual reflection

# 11:15 AM – 12:30 PM Session IV: School Improvement Reflection: Context and Implications

Bryan Johnson, Superintendent, Hamilton County Schools

Tiffany Stanley, Chief of Staff to the State Superintendent of Public Instruction, Utah State Board of Education

Cindy Ambrose, Deputy Superintendent, Charleston County School District

Faculty will respond to issues raised in earlier sessions and respond to the questions staffers are most interested in learning more about.

#### **Guiding Questions:**

Is ESSA's theory of action around school improvement playing out as envisioned? Why or why not?

Are ATS and TSI identified schools sufficiently differentiated? Are underperforming subgroups being identified for improvement as required? How do we know? How are SEAs leveraging ESSA's evidence requirements for interventions? What interventions are they using?

What role can/should ED play in promoting effective practices and evidence-based improvement strategies?

#### 12:30 - 1:30 PM

# Lunch

#### Airlie Room

#### 1:30 - 3:15 PM

#### Session V: Innovation and Federal Policy

Cindy Ambrose, Deputy Superintendent, Charleston County School District Virgel Hammonds, Chief Learning Officer, KnowledgeWorks

Staff will go on a partner walk to address the following questions:

- 1. What innovation(s) did you expect to see as a result of ESSA and how has this played out in practice?
- 2. How can innovation be balanced with the equity guardrails required in the law?

All staff and faculty will engage in a full group discussion reflecting on discussions from the partner walk. This will be followed by a look at how states and districts are thinking about innovation in accountability and assessment.

# Additional Guiding Questions:

How does innovation support ESSA's goals?

What implications for equity can we draw from innovative efforts at the state and district levels to date?

What is the role of ESSA relative to other state and/or district policies, practices, and/or funding streams in supporting innovation? How could these policies be more coherent and aligned?

3:15 - 3:30 PM

**Break** 

3:30 - 4:45 PM

# Session VI: Exploring Report Cards in the ESSA Era

Leah Walker, Director, Office of Equity and Community Engagement, Virginia Department of Education

Bryan Johnson, Superintendent, Hamilton County Schools

Tiffany Stanley, Chief of Staff to the State Superintendent of Public Instruction, Utah State Board of Education

#### **Guiding Questions:**

How is ESSA's theory of action around transparency and school improvement playing out?

How are report cards helping to highlight equity? Are states complying with all of the reporting requirements under the law? Are there any concerns about transparency, accessibility, and disaggregation?

How are SEAs and LEAs reporting on required additional measures (such as discipline or teacher quality data), or additional measures they have chosen to report on that do not contribute to accountability determinations?

Which SEA or LEA report cards are especially well-designed? What about them seems most promising?

4:45 - 5:15 PM

Taking stock: Staff reflections and feedback to guide remaining discussions

6:00 - 7:00 PM

Networking Reception with Expert Faculty

Pavilion Room

Staffers will have the opportunity to network with faculty during the reception.

7:00 - 8:30 PM

Dinner with Discussion of Earlier Sessions

Pavilion Room

Thursday, August 8, 2019

All meeting sessions are in the Federal Room

7:30 - 8:30 AM

Breakfast

Airlie Room

8:30 - 8:40 AM

Staff reflections and feedback to guide remaining discussion

8:40 - 10:20 AM

Session VII: Future Opportunities for Connecting Innovation and School Improvement under ESSA

**Guiding Questions:** 

How can state and district leaders leverage innovative practices to support school improvement efforts? What are the technical and adaptive challenges to achieving this?

What is needed to ensure innovative practices comply with the law's requirements for evidence-based school improvement?

How tight/loose do SEAs and LEAs need to be to create space for innovation while meeting required timelines for improvement and outcomes?

What role can Congress and ED play to ensure SEA and LEA leaders are using federal funds to support innovation, while ensuring those federal funds are used on evidence-based school improvement efforts?

12:00 – 1:00 PM	Lunch and Adjourn	Airlie Room
11:20 – 11:45 PM	Taking Stock: Staff Reflections and Feedback to Guide Next Sta	eps for the Network
10:50 – 11:20 AM	Final Observations from Expert Faculty	
10:30 – 10:50 AM	Complete Retreat Evaluation	
10:20 – 10:30 AM	Break	